NATIONAL CANNERS ASSOCIATION

INFORMATION LETTER

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THE ANNUAL CONVENTION

Most important among the subjects for discussion at the annual convention of the National Canners Association to be held in Chicago the week of January 25th, will be the industry's problem of adjusting its production plans and methods to changing business conditions. The opening session on Monday afternoon, to which members of the distributing trades have been invited, will be devoted to this subject. The principal address will be made by Mr. Nils A. Olsen, Chief of the Bureau of Agricultural Economics of the U. S. Department of Agriculture. Others will participate in the program.

Program arrangements are now practically completed, and copies of the program will be sent to canners soon after the New Year. Following the opening session on Monday, the next three days will be devoted to Section meetings and informal conferences. There will be three informal conferences each on canning problems and raw products problems, and a single conference Wednesday on home economics subjects. The convention will end with a general meeting on Friday morning.

Requests for room reservations at the Stevens Hotel, the headquarters for the National Canners Association, the Canning Machinery and Supplies Association, and the National Food Brokers Association, indicate that the attendance will be as large as at previous conventions. A number of other food organizations will meet in Chicago during the week, thus bringing together the year's largest gathering of representatives of the food industries and trade.

RAILROAD RATES FOR CONVENTION

Reduced rates to members and dependent members of their families of a fare and a half for the round trip to Chicago for the annual convention have been granted by all of the passenger associations.

Tickets for these reduced rates will be on sale by all passenger associations in the United States and Canada, and will have a return limit of 30 days in addition to date of sale.

Tickets may be procured to go and return the same route, or to go any authorized route and return by another authorized

route; but purchasers must indicate to ticket agent at the time they purchase tickets which routing is desired.

Such tickets will be on sale in a greater part of the territory from January 21st to 27th, inclusive; in Oklahoma, Texas, Colorado, New Mexico and Wyoming they will be on sale from January 20th to 26th, inclusive; in Arizona, Idaho, British Columbia, Montana, Nevada, Oregon, Utah and Washington they will be on sale from January 19th to 25th, inclusive; in California they will be on sale from January 18th to 24th, inclusive.

Return tickets must be validated in Chicago before the beginning of the return journey.

HOW CANNING TOMATO CROP WAS USED

In its report showing the harvested acreage and production of tomatoes for manufacture, by states, issued on December 22, the Division of Crop and Livestock Estimates also furnished figures on the use of this crop.

According to reports from canners representing more than half of the total tonnage of tomatoes estimated for manufacture in 1931, 56.7 per cent of the tonnage was used for canned tomatoes and 43.3 per cent for other tomato products, such as tomato paste, pulp, puree, soups, catsup, juice, sauces, etc. Similar reports in 1930 indicated that 52.4 per cent of the 1930 crop was used for canned tomatoes and 47.6 per cent for other tomato products. In 1929, the indicated percentages were 53.8 per cent of the crop for canned tomatoes and 46.2 for other tomato products.

CALIFORNIA CANNED TOMATO PACK

The 1931 pack of canned tomatoes in California, as reported by the Canners League of California, was 1,005,507, as compared with 4,245,175 cases in 1930. The annual pack of canned tomato products is reported as 1,169,850 cases, compared with 3,452,457 a year ago. The total pack of canned tomatoes and canned tomato products of Southern California, as compiled by the Southern California Canners Association, was 228,973 cases, which was included in the above totals.

TOMATO PRODUCTS IMPORTS

In November the imports of canned tomatoes were about 376,000 pounds larger than in October and about 246,000 pounds less than the receipts during November last year. For the eleven months of 1931 imports were about 20,300,000 pounds greater than during the corresponding period last year.

1930	Canned Tomatoes		Tomato Paste	
	Pounds	*Value*	*Pounds*	*Value*
January	8,939,178	$427,845	1,635,369	$129,824
February	5,834,313	283,425	1,050,583	88,842
March	2,902,848	139,808	658,934	53,743
April	5,425,074	291,292	932,968	83,269
May	6,453,591	308,250	2,368,368	246,630
June	648,681	25,063	456,605	43,731
July	326,151	23,163	310,481	27,343
August	125,402	4,559	570,633	56,211
September	2,047,904	90,698	1,377,458	127,151
October	9,688,351	399,667	1,004,642	82,546
November	9,586,907	376,803	1,233,962	76,382
Total	51,978,400	2,370,573	11,600,003	1,015,672
1931				
January	5,611,727	198,377	796,143	62,736
February	7,375,831	235,570	873,380	75,763
March	7,000,827	243,769	907,242	66,645
April	9,932,389	364,172	1,642,420	149,668
May	8,092,003	289,368	953,333	68,233
June	5,517,949	201,246	1,047,352	88,704
July	3,471,766	125,836	1,129,609	84,819
August	3,579,515	124,599	2,564,658	218,210
September	3,405,354	111,513	366,012	23,508
October	8,963,883	283,786	875,509	59,385
November	9,340,672	302,892	931,587	59,922
Total	72,291,916	2,481,128	12,087,245	957,593

REPORT MADE ON CHAIN STORE INVESTIGATION

Three reports on its investigation of chain stores have been transmitted to the Senate by the Federal Trade Commission. Summaries of these three reports are contained in the letters of submittal, from which the following excerpts are taken:

Scope of Inquiry

The Commission's study represents approximately one-half of the number of stores operated and one-half of the aggregate sales volume of all organizations engaged in chain store merchandising in 1929 in the 26 kinds of business covered by the inquiry, including chains of two and three stores which are not classed by the Census as chain stores. The total number of chains represented in the Commission's inquiry is estimated to be something under 10 per cent of the total. Comparing the Census figures of chains of four stores or more with the Commission's figures for those with six stores or more for the same lines of business, the Commission's reports account for approximately one-fifth of the Census chains, two-thirds of their stores, and 70 per cent of their total sales.

The data on sources of chain store merchandise are based chiefly on the returns of 1,396 chains in 1928 with comparative data of 555 chains in 1922.

Source of Chain Store Goods

As nearly as can be estimated, the 1,396 reporting chains in 25 different kinds of business purchased in the aggregate 93 per cent and manufacture 7 per cent of their total supply of merchandise. Less than 14 per cent of all reporting chains engage in manufacturing.

Purchase from manufacturers is by far the most important source of chain store merchandise, accounting for approximately 70 per cent of the aggregate supply of all chains.

While the volume purchased through wholesalers by all types of chain averages only 7.9 per cent of total purchases, buying from wholesalers is

a common practice on the part of chains in all lines of business and reaches very substantial proportions in many of them.

The grocery, department store, and men's furnishings chains buy more than 10 per cent from wholesalers, and, if the Great Atlantic and Pacific Tea Company and the Kroger Grocery and Baking Company be omitted, the purchases from wholesalers by the grocery and meat chains average 17.3 per cent of their total purchases.

During the period 1922-1928 the chains were generally increasing in size. For example, the combined average number of stores operated by the grocery and grocery and meat chains reporting sources of purchases in these two years increased from 43.2 to 83.9 stores per chain.

The two to five store grocery and grocery and meat chains purchase 27 per cent from manufacturers, while chains operating more than 1,000 stores in the same line of business purchase 66 per cent from that source.

Chains in different lines of business show marked difference in sources patronized. Grocery chains obtain 48.5 per cent of their purchased merchandise from manufacturers, and the grocery and meat chains, 63.1 per cent from that source.

The grocery and the grocery and meat chains diversify their purchases among the four types of sources to a far greater degree than any other of the 25 kinds of chains whose purchasing practices are analyzed in this report. Their relatively small purchases from manufacturers are not offset by relatively large purchases from wholesalers, but by larger purchases from growers, brokers and commission men. Twenty-nine per cent of grocery chain purchases are made through brokers and commission men; while the grocery and meat chains buy 11 per cent from that source and 16 per cent from growers. Excluding the two largest grocery and meat chains, the average purchased through brokers and commission men by that group is 23 per cent.

Reports obtained from a number of the larger grocery and meat chains, describing their purchasing practices in considerable detail, indicate that the extensive dependence of food chains upon brokers and commission men is accounted for in a large degree by the highly perishable character of many products which they sell. The necessity of obtaining promptly their enormous requirements in perishable products from whatever sources are at the time in a position to deliver them, gives the broker an opportunity to perform a service for which these chains are apparently willing to pay. The Great Atlantic and Pacific Tea Company and the Kroger Grocery and Baking Company have developed broker organizations of their own for purchasing fruits and vegetables, but even these subsidiary organizations do not by any means take care of all their requirements in these products.

Reports of almost 100 grocery and grocery and meat chains as to the sources of supply patronized in the purchase of 22 specified commodities and commodity lines show that the importance of wholesalers to chains in these lines of business applies quite generally to all of the commodities handled by them. Manufacturers, of course, are a more important source than wholesalers for most commodities, but eggs, produce and provisions, and fresh fruit and vegetables are supplied to these chains chiefly by growers, brokers and commission men and wholesalers. Brokers and commission men partly supply these chains with all of the specified lines and items, although the proportion furnished is less than 10 per cent in a number of commodities. Growers take part in supplying to these chains 14 of the 22 lines reported, but in this case also the proportion is small in many lines. The largest proportions supplied by brokers and commission men are found in sugar, the several lines of canned foods, dried and fresh fruits, and vegetables. Growers and their organizations are patronized most extensively in the purchase of eggs and fresh fruit and vegetables.

Wholesale Business of Chains

Two hundred of the 1,655 chains answering the inquiry in respect to wholesale business report that they wholesale as well as retail.

One hundred and thirteen of the 200 chains that wholesale report a breakdown of their 1928 sales between wholesale and retail business. These chains operated 27,473 stores and had total sales of $1,686,005,590 in 1928 of which 5.1 per cent ($86,087,693) were sales at wholesale. But if the results for the two large chains are excluded, then the proportion of wholesale sales of the remaining 111 chains is much greater—well over 12 per cent.

Wholesaling is by far the most extensive among four kinds of chains: musical instruments, grocery and meat, hardware, and confectionery, approximately in the order named.

The importance of the grocery and meat chains in respect to wholesale sales is reflected in the fact that they account for nearly half of the total wholesale business reported by 113 companies. If the results for grocery, confectionery, and meat chains are added to those for the grocery and meat chains, then these four groups comprise more than one-half the number of retail chains reporting wholesaling, operate more than 95 per cent of total stores reported and account for nearly 70 per cent of the reported wholesale sales.

The products sold most extensively at wholesale by meat and grocery chains are sugar, flour, canned goods, lard and meats. Grouping related commodities wholesaled by meat and grocery chains, the order of the frequency with which the leading classes of commodities were reported sold at wholesale is meat products, miscellaneous groceries (flour principally), imported groceries (chiefly) which includes sugar principally, and produce.

CANNED MILK PRODUCTION AND STOCKS

Stocks of evaporated milk in manufacturers' hands on December 1st were about 7 per cent greater than the November 1st stocks, and about 33 per cent less than the stocks held on December 1, 1930. Condensed milk stocks showed a decline of about 12 per cent from the previous month and approximately 26 per cent from December 1, 1930. Production of evaporated milk during November fell 10 per cent short of that of November, 1930. The following table gives the stocks and production (case goods) as reported to the Bureau of Agricultural Economics by manufacturing firms operating about 99 per cent of the factories:

	1931	1930	Change
	Pounds	*Pounds*	*Per cent*
Total stocks (case goods) December 1:			
Evaporated milk (32 firms)	139,844,324	211,082,567	—33.75
Condensed milk (9 firms)	15,130,335	20,656,662	—26.76
Total production (case goods) November:			
Evaporated milk (31 firms)	80,992,761	90,309,736	—10.32
Condensed milk (8 firms)	7,256,435	8,060,197	— 9.98

FRANCE ESTABLISHES IMPORT CONTINGENTS ON CANNED FISH

Import contingents have been established for the importation into France of canned fish for the period from December 1, 1931, to February 29, 1932, by a decree published in the French Journal Officiel.

For the above mentioned period, a total quota of 3,750 metric tons is established for "preserved sardines" (not including American pilchards) from all countries, and a total quota of 6,400 metric tons for "other preserved fish" (including American

pilchards), pickled or otherwise prepared, from all countries. Of the latter quota, there are established individual quotas of 1,850 metric tons for imports from the United States, 1,660 metric tons for imports from Canada, and 1,600 metric tons for imports from Japan.

TRUCK CROP SHIPMENTS

Total shipments of 27 products decreased during the week ended December 19 to 12,560 cars, but were only a little lighter than movement of a year ago.

Tomato movement for the seven-day period was 110 cars, of which Florida furnished 75, Texas 30, and Ohio 5 cars. Mexico and Cuba each sent about 35 carloads to the United States, and first arrivals came from the Bahamas.

CARLOT SHIPMENTS

Commodity	Dec. 13-19 1931	Dec. 6-12 1931	Dec. 14-20 1930	Total this season thru Dec. 19	Total last season thru Dec. 20	Total last season
Apples, total	1,386	1,990	1,563	67,909	80,673	109,794
Eastern states	731	821	548	38,931	33,629	43,256
Western states	655	1,169	1,015	28,978	47,044	66,538
Beans, snap and lima:						
Domestic	325	353	48	2,000	1,519	9,318
Imports	44	27	0	89	0	199
Beets:						
1932 season	19	23	.....	213	.....	1,638.
1931 season	2	8	.....	1,638	.....	.....
Cabbage:						
1932 season	191	168	186	503	488	34,484
1931 season	417	622	433	34,484	34,114	38,204
Carrots:						
1932 season	178	134	146	1,289	1,748	10,249
1931 season	85	107	54	10,249	11,018	12,437
Cauliflower	152	166	263	3,863	4,307	9,611
Mixed vegetables:						
Domestic	456	464	570	27,497	30,549	31,180
Imports	11	2	3	22	25	267
Pears	41	97	128	18,765	27,511	28,821
Peas, green:						
Domestic	0	1	18	312	930	7,162
Imports	43	20	37	64	58	1,344
Peppers	95	67	103	370	451	2,821
Spinach:						
1932 season	230	137	470	761	1,745	9,763
1931 season	24	27	3	9,763	9,636	9,636
Tomatoes:						
1932 season—						
Domestic	76	51	124	189	413	27,807
Imports	74	26	253	110	600	5,975
1931 season	32	53	27	27,807	34,019	34,050

WHOLESALE PRICES IN NOVEMBER

The index number of wholesale prices computed by the Bureau of Labor Statistics, shows a minor decrease for November, being 68.3 for November as compared with 68.4 for October. This index number, based on the average prices for 1926

as 100, shows a decline of 15 per cent as compared with November, 1930. Price decreases were reported for canned salmon, canned corn, peas, peaches and pineapple.

POULTRY USED IN CANNING

The quantity of poultry used in canning during November, as reported by the U. S. Market News Service, is as follows, the figures for drawn poultry having been converted to an undrawn basis, assuming a 25 per cent shrinkage in drawing:

	Quantities reported to date for November 1931	Same-firm comparisons			
		November 1931	October 1931	November 1931	November 1930
	Pounds	*Pounds*	*Pounds*	*Pounds*	*Pounds*
Dressed poultry canned or used in canning	652,412	619,008	752,118	584,119	1,427,295
Drawn poultry canned or used in canning	115,080	115,080	164,852	115,080	447,488
Total	767,492	734,083	916,970	699,199	1,874,783
Number of firms reporting	31	25	25	28	28

EMPLOYMENT IN NOVEMBER

The U. S. Bureau of Labor Statistics reports a decrease of 2.4 per cent in employment from October to November, and a decrease of 3.7 per cent in payroll totals, based on returns from 15 industrial groups. These industrial groups included 50,200 establishments having in November 4,551,410 employes, whose combined earnings in one week were $101,596,891. Increased employment and payroll totals were reported in the retail trade group, in continuation of the seasonal expansion which began in September.

BUSINESS INDICATORS

(Weeks ended Saturday; weekly average 1923-1925=100)

	1931			1930		
Composite Index:*	Dec. 19	Dec. 12	Dec. 5	Dec. 20	Dec. 13	Dec. 6
New York Times	.....	63.2	†63.7	79.4	79.0	81.3
Business Week	.....	64.5	†65.2	77.5	77.1	78.3
Freight car loadings	.....	64.0	66.4	74.5	77.6	82.1
Wholesale prices (Fisher's):						
All commodities	67.0	67.1	67.6	79.4	79.8	80.7
Agricultural products	50.7	51.2	51.6	79.4	75.5	76.9
Non-agricultural products	69.4	69.3	69.9	80.0	80.2	80.5
Bank debits outside New York City	87.2	73.8	79.1	119.3	97.9	107.1
Bond prices	83.9	87.9	90.0	104.2	104.6	106.0
Stock prices	74.7	78.4	83.1	148.4	152.5	162.2
Interest rates:						
Call money	60.6	60.6	60.6	58.7	48.5	48.5
Time money	80.0	80.0	80.0	68.6	62.9	64.7
Business failures	163.9	141.3	135.1	148.4	138.1	146.9

* Relative to a computed normal taken as 100.
† Revised.

CAR LOADINGS

Preliminary reports, which will not become complete for several weeks, indicate that loading of revenue freight in 1931 will total 37,250,000 cars, a reduction of 8,630,000 cars, or 18.8 per cent, under that for 1930, and 15,577,900 cars, or 29.5 per cent, under 1929.

Measured in net ton miles, the volume of freight handled in 1931 will be, complete reports are expected to show, 340,000,000,000 net ton miles, a reduction of 19.5 per cent under 1929.

	Total	Merchandise		Other
		Miscellaneous	L. C. L.	
Week ended December 12	613,534	200,379	197,558	215,597
Previous week	636,366	213,555	202,573	220,238
Corresponding week, 1930	744,353	262,174	219,005	263,174
Corresponding week, 1929	922,861	322,103	245,043	355,715

ALASKA FISH CANNERY BILL REINTRODUCED

Representative Welch, of California, has reintroduced the bill making it unlawful to operate any cannery in Alaska unless a report has been filed with the Secretary of Commerce not later than December 1 of the preceding year, stating the proposed place of operation, likewise prohibiting the operation of such a cannery in more than one place or location in any calendar year. The bill would also make it unlawful to import for other than personal use, salmon from waters outside the jurisdiction of the United States, taken during any closed period.

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